



Filing ID #10020076

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Joseph Hoeffel  
**Status:** Congressional Candidate  
**State/District:** PA04

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2018  
**Filing Date:** 03/30/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Aspen Port Strategy ASPNX		\$1 - \$1,000	Dividends	None	\$1 - \$200
Brown Advisory Small Cap Fun BAUAX		\$15,001 - \$50,000	Capital Gains	None	\$5,001 - \$15,000
Cohen & Steers Real CSDIX		\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
Dreyfus INTL Equity DIERX		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Glenmede Large Cap Growth Adv GTLLX		\$15,001 - \$50,000	Capital Gains	None	\$5,001 - \$15,000
Glenmede Large Cap Growth GTILX		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Hartford World BD FD CL Y HWDYX		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
IVY EMRG MKTS EQTY FD CL IPOIX		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Lifestrategy Consrv Growth		\$100,001 - \$250,000	Dividends	\$1 - \$200	\$5,001 - \$15,000

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Montgomery County, PA, Retirement		Undetermined	pension	\$5,001 - \$15,000	\$15,001 - \$50,000
Nuveen Real Estate Secs I. FARCX		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Public School Employees' Retirement		Undetermined	pension	\$5,001 - \$15,000	\$15,001 - \$50,000
Red Oak Technology ROGSX		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Schwab Fundamental US SFSNX		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Schwab Fundamental US Smal SFSNX		\$15,001 - \$50,000	Capital Gains	None	\$5,001 - \$15,000
Schwab Fundamental US. SFLNX		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$2,501 - \$5,000
T Rowe Price Health PRHSX		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
T Rowe Price PRSMX		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
T Rowe Price Summit Muni Inter PRSMX		\$15,001 - \$50,000	Capital Gains	None	\$201 - \$1,000
T Rowe Price Tax Free PRFSX		\$1,001 - \$15,000	Dividends	None	\$1 - \$200
T Rowe Price Tax Free Short. PRFSX		\$50,001 - \$100,000	Capital Gains	None	\$201 - \$1,000
United Way of Southeast PA		Undetermined	pension	\$201 - \$1,000	\$1,001 - \$2,500
Vanguard 500 Index Fund		\$100,001 - \$250,000	Dividends	\$1 - \$200	\$1,001 - \$2,500
Vaughan Nelson Value Opport VNVYX		\$15,001 - \$50,000	Capital Gains	\$1 - \$200	\$2,501 - \$5,000
Victory Sycamore VEVIX		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000

## **SCHEDULE C: EARNED INCOME**

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Montgomery County, PA Retirement System	pension	\$16,745.00	\$16,745.00
PA Public School Employees' Retirement System	spouse pension	N/A	N/A
United Way of Southeast PA	spouse pension	N/A	N/A
Max Gartenberg Literary Agency	book advance	N/A	\$850.00
Pinnola & Bomstein	legal referral fee	N/A	\$1,477.00

**SCHEDULE D: LIABILITIES**

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Wells Fargo Bank	September 2017	personal loan	\$15,001 - \$50,000

**SCHEDULE E: POSITIONS**

Position	Name of Organization
partner	Maza, David & Hoeffel

**SCHEDULE F: AGREEMENTS**

Date	Parties To	Terms of Agreement
January 1992	myself and Montgomery County, PA	county pension

**SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE**

None disclosed.

**EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION**

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

**CERTIFICATION AND SIGNATURE**

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the

best of my knowledge and belief.

**Digitally Signed:** Joseph Hoeffel , 03/30/2018